

Planning With Partners: Moving from Goals to Effective Action

☒ Checklist

1. Establish the planning context

- ☐ State the overall purpose of the partnership
- ☐ Summarize the partnership's vision
- ☐ Review significant environmental trends affecting TB in your area
- ☐ Summarize the partnership's successes and lessons learned to date

Use these steps to focus the planning process on options and actions that will have the most impact on TB prevention and control.

2. Brainstorm options

- ☐ Write one word or a one-phrase idea offered by each partner on a flip chart. Each partner has one, or several, orderly opportunities to contribute.
- ☐ No ideas are discussed, evaluated, or excluded.

Brainstorming encourages partners to generate a wide variety of options and to build on each other's ideas.

3. Narrow the field

- ☐ Each partner identifies two or three options he or she sees as having the biggest impact on the vision.
- ☐ Each partner describes the impact he or she believes each chosen option will have on the vision.
- ☐ Together, partners make a final selection of the options they think the partnership should pursue at this time.

These steps help focus the discussion on fully understanding and comparing the relative merit of all options that might impact the vision.

4. Summarize the remaining options

- ☐ Partners work together to create a one or two sentence description or definition of the options selected above.

This step helps the group solidify the choices it made above.

5. Identify the SMART (specific, measurable, attainable, realistic, and time-framed) objectives needed to implement each option

- ☐ Identify one or more SMART objectives to implement each remaining option.

When all partners responsible for implementing an option help to create its SMART objectives, the objectives are more likely to be appropriate and realistic.

6. Identify the steps needed to achieve the SMART objectives

- ☐ Identify the data, procedures, and steps you will use to evaluate your outcomes.
- ☐ Use the Planning with Partners Worksheet to clarify the tasks needed to implement your SMART objectives.

Identifying the needed steps alerts partners to SMART objectives that may be overly ambitious or difficult to achieve, allowing partners to modify such objectives before problems occur.